



MyEducationBC

Fundamentals

November, 2015 v 1.2

Version History

Version	Date	Description
1.0	April 1, 2015	Initial version
1.1	September 15, 2015	Added description of basic system filters on Student top tab.
1.2	November 16, 2015	Removed reference to records per page. Replace Ctrl + F instructions with the search tool. Various screen shot updates.

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Table of Contents

1.0	FUNDAMENTALS TRAINING	5
1.1	Logging In	5
2.0	MANAGING USER PREFERENCES	6
2.1	Security	6
2.2	Settings Bar	6
2.3	Removing Browser Buttons (F11)	11
3.0	NAVIGATION TOOLS & SELECTING RECORDS	11
3.1	Top Tabs and Side Tabs	11
3.2	Sub-side Tabs, Sub-top Tabs and Leaves	12
3.3	Page selector	13
3.4	Record Navigation Bar	13
3.5	Search Tool	14
3.6	Hyperlinks	14
3.7	Breadcrumbs	15
3.8	Checkboxes vs Radio Buttons	15
3.9	Clearing Record Selections	16
4.0	ICONS AND ALERTS	16
5.0	MENU BAR	17
5.1	Options	17
5.2	Reports	17
5.3	Help	18
5.4	Menu Bar Tools	19
6.0	SNAPSHOTS	35
6.1	Creating and Deleting Snapshots	35
6.2	Add a Snapshot to a Student	37
6.3	Removing a Snapshot from a Student	37
7.0	QUERIES	38



7.1	Creating a Simple Query	38
7.2	Saving a Query	39
7.3	Editing a Query	40
7.4	Copying a Query	40
7.5	Delete a Query.....	41
8.0	CREATING A SIMPLE QUICK REPORT.....	41

1.0 Fundamentals Training

1.1 Logging In

An account will be created and log-in information issued to a user as per district policy. When a user initially logs in, they will be prompted to change their password immediately. Passwords are case-sensitive and must be in compliance with the Ministry of Education requirements.

1. Go to <https://www.myeducation.gov.bc.ca/asp/en/logon.do>
2. Enter the username provided in the **Login ID** field.
3. Enter the password provided in the **Password** field.

The screenshot shows a login form with the following elements:

- Login ID** field: Contains the text "testuser".
- Password** field: Contains a series of dots representing a masked password.
- Log On** button: Located below the password field.
- I forgot my password** link: Located to the right of the password field.

4. Click **Log On**.
5. The following window will pop up. In the **Current Password** field, enter the password issued for the initial login. In **New Password** and **Confirm New Password**, enter a new password that observes the requirements indicated in the top portion of the pop-up.
6. Click **OK**.

The screenshot shows a "Password Requirements" pop-up window with the following content:

Password Requirements

- Minimum length is 8
- At least one number
- At least one capital and lowercase letter
- At least one symbol that isn't a letter or number
- Can't contain 'password', login name, first name, middle name, last name, date of birth, personal id, or only sequential letters or numbers

Below the requirements are three password input fields:

- Current Password**: Contains a series of dots.
- New Password**: Contains a series of dots.
- Confirm New Password**: Contains a series of dots.

At the bottom of the window are **OK** and **Cancel** buttons.

2.0 Managing User Preferences

2.1 Security

Access to MyEducation BC will be determined by the security role that is assigned to the user account. This access is assigned by the district as required for the role and duties performed by the role.

2.2 Settings Bar

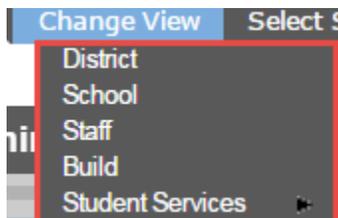
The settings bar is the first step in navigating MyEducation BC. The options available to the user here are determined by the security access granted by the district. *Select School*, for example, will only appear if the user has been assigned to more than one school.

All users will see **Set Preferences** and **Log Off**



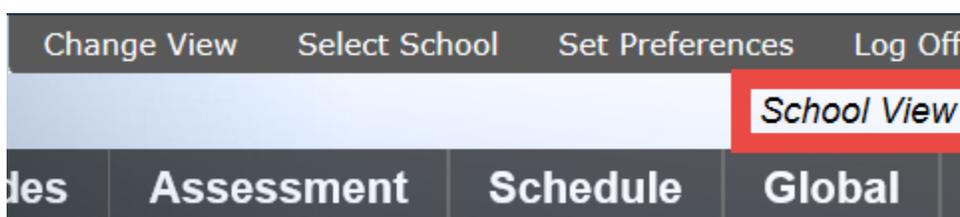
2.2.1 Change View

Change View allows the user to navigate between different levels of the application, if the appropriate security access has been given to the user. The example below is a common display for a district level user.



To change views:

1. Click the **Change View** selection on the settings bar.
2. Click on the name of the view to work in. The name of the view will be displayed just below the settings bar.

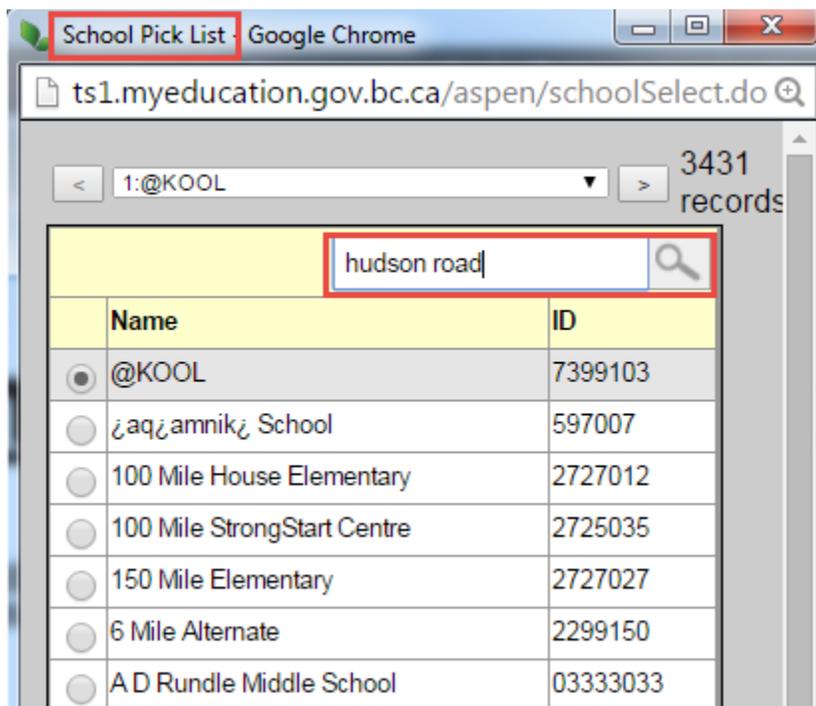


2.2.2 Select School

If the user account has access to more than one school, the Select School option will appear on the settings bar menu.

To select a school:

1. In the **Change View** menu, select **School**
2. Click the **Select School** selection on the settings bar. This will generate a pop-up window.
3. Click the radio button beside the appropriate school.
4. Click **OK**.



2.2.3 Set Preferences

This option on the settings bar allows the user to personalize MyEducation BC, based on their needs. These settings are specific to the user account. There may be more options that in the screenshot below, depending on the view (District view is different from School view).

2.2.3.1 General

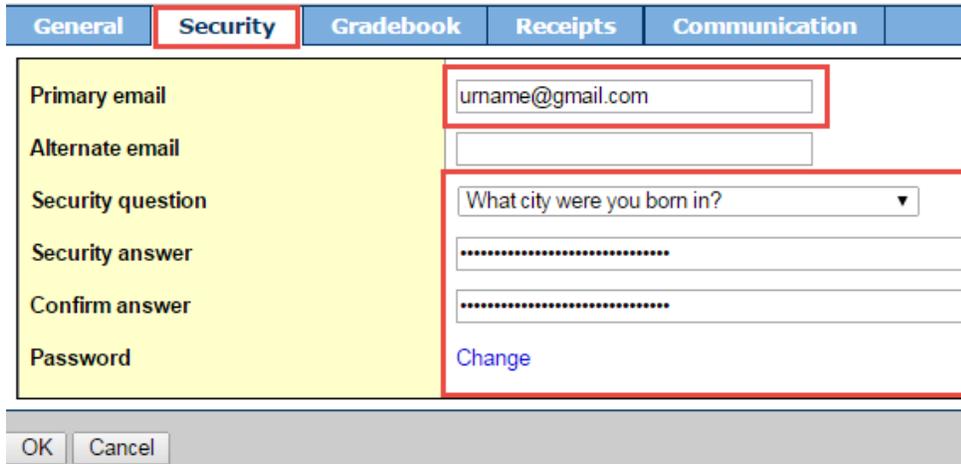
These settings determine the “look and feel” for MyEducation BC for the individual user. See the table below the screenshot for a definition of each of these fields.

Field	Description
Default Locale	Click this drop-down to select the language and date preferences when using MyEducation BC. This selection also affects the display of dates in MyEducation BC. select: Canada: Dates appear as date/month/year French (Canada): Dates appear as year/month/date US: Dates appear as month/date/year The current recommended setting is US as some reports rely on this setting to run.
Default View	Click this drop-down to select the default view when logging on to MyEducation BC, such as the School view. (This option is only available if the role assigned to the user has access to more than one view. For example, a school administrator may have access to the School view and the Build view and the Student Services view).
Default School	Click the  to select the default school when accessing the School view. (This option is only available if the user has access to more than one school.)

Field	Description
Auto-save interval (minutes)	Type the number of minutes to lapse before the system automatically saves the information entered on a detail page. The system displays a message to the right of the Save and Cancel buttons on detail pages, alerting the user of the time of the last auto-save, or why the auto-save failed.
Disable User-defined Help	This disables the user-defined help icon  for fields. This icon gives brief “tip” information on what is expected in that field.
Records per page	This determines how many records appear on the screen in a list before moving to the next page to see more. This is currently locked at the Enterprise level, to 35 records per page.
Show lower page controls	Page controls will automatically appear at the top of a page where the number of records in the list exceeds one page. To display the page controls at the bottom of all list pages, select this checkbox. 
Warn on save	If this box is checked, the system to display a warning when the user clicks Save on a list page after using the Modify List option. This is specific to the Modify List function and does not affect the user prompts to save when changing screens or tabs in the application.

2.2.3.2 Security

The Security sub-top tab in Set Preferences records the user’s email address and security question and answer. This information must be populated for the user to be able to use the “Forgot Password” function in MyEducation BC. This area also allows the user to change their password at any time. See the table below the screenshot for a definition of each of these fields.



Field	Description
Primary email	Type the primary email address. The system sends the password to this address when the 'I forgot my password' link on the logon page is used. Note: This is the address that appears in the From field when using the Send Email option.
Alternate email	If an alternate email address is entered, such as for Google Docs account, that address appears. This has no functionality in MyEducation BC.
Security question	Click this drop-down to select the security question to be used for the “I forgot my password” function.
Security answer	Type the answer for the security question. This will be case-sensitive.
Confirm answer	Type the security answer again.
Password	Click Change to change a user password. Password requirements can be viewed by clicking Click to view .

2.2.4 Log Off

All users should use the **Log Off** item in the *Settings Bar* to exit MyEducation BC. This will properly terminate the session and force the entry of a login id and password to re-enter the system.

2.3 Removing Browser Buttons (F11)

Browser buttons for back and forward and cancel should not be used to navigate the application. In MyEducation BC, it is always best to use the application buttons to close a pop-up window, go back to a previous screen, exit the application, etc.

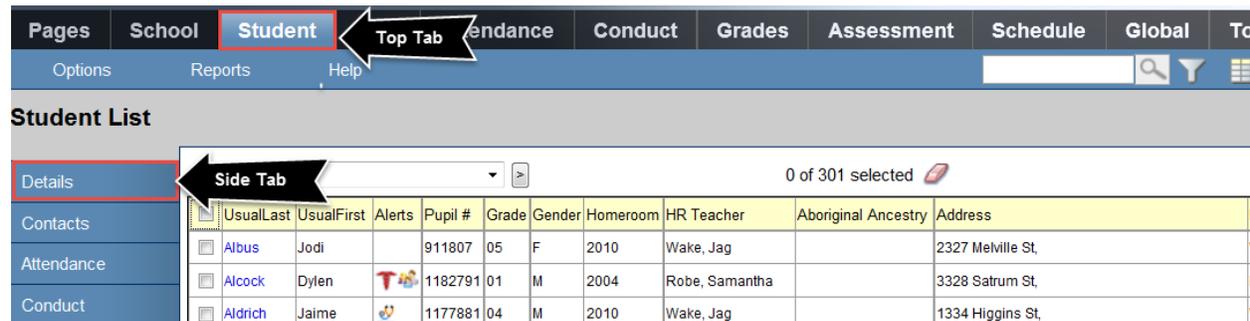
Users can remove the temptation to use the browser buttons by pressing F11 to hide the browser menu. This is a toggle function, so pressing F11 again will cause the browser buttons to re-appear when needed.

3.0 Navigation Tools & Selecting Records

3.1 Top Tabs and Side Tabs

Top tabs represent functional areas of MyEducation BC. These are scoped to the user view and role, so a user will only see what they have been given access to view or work with. The top tab that is highlighted indicates where the user is in the application.

Side tabs provide access to additional details of the top tab functional area.



The screenshot shows the MyEducation BC interface. At the top, there is a navigation bar with several tabs: Pages, School, Student (highlighted in red), Attendance, Conduct, Grades, Assessment, Schedule, Global, and To. Below this bar, there are sub-tabs: Options, Reports, and Help. A black arrow labeled 'Top Tab' points to the 'Student' tab. Below the navigation bar, the main content area is titled 'Student List'. On the left side of this area, there is a vertical list of side tabs: Details (highlighted in red), Contacts, Attendance, and Conduct. A black arrow labeled 'Side Tab' points to the 'Details' tab. The main content area displays a table with columns: UsualLast, UsualFirst, Alerts, Pupil #, Grade, Gender, Homeroom, HR Teacher, Aboriginal Ancestry, and Address. The table contains three rows of student data. At the top right of the table, it says '0 of 301 selected'.

UsualLast	UsualFirst	Alerts	Pupil #	Grade	Gender	Homeroom	HR Teacher	Aboriginal Ancestry	Address
Albus	Jodi		911807	05	F	2010	Wake, Jag		2327 Melville St,
Alcock	Dylen		1182791	01	M	2004	Robe, Samantha		3328 Satrum St,
Aldrich	Jaime		1177881	04	M	2010	Wake, Jag		1334 Higgins St,

3.2 Sub-side Tabs, Sub-top Tabs and Leaves

Side tabs usually contain sub-side tabs, leaves and sub-top tabs.

0 of 5 selected

Name	Type	Relationship	LivesWith	Parent or Guardian?	PickUp?	Address
Gonin, Shelby	Doctor		N	N	N	
Hartley, Cassidy	Mother		Y	Y	Y	3303 McMahon Road
Madill, Morgan	Father		Y	Y	Y	3303 McMahon Road

Sub-top tabs appear at the top of a list, when a side tab is selected. A good example of this is in the **Student** top tab > **Details** side tab.

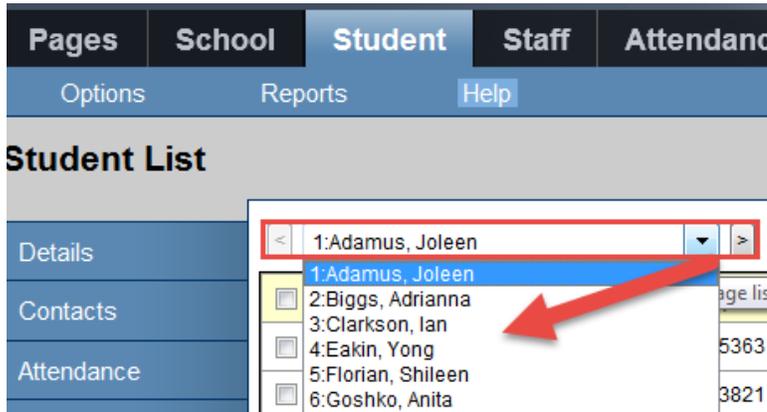
Save Cancel

Demographics	Alerts	Citizenship	Programs	Permissions	Language & Culture
<p>Pupil # 416670</p> <p>Personal Education Number 124781162</p> <p>Legal last name * Adkins</p> <p>Legal first name * Rishelle</p>					<p>Photo Upload</p>

3.3 Page selector

This navigation tool allows the user to select a range of records, something like a dictionary. Each selection in the page selector will display 35 records. This tool will appear at the top and bottom of the list if the user has set their preference to *Show lower page controls*.

A user can use the drop-down arrow to select a page in the list or the back and forth arrows at either side to move through the pages consecutively.



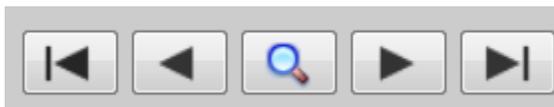
3.4 Record Navigation Bar

The *Record Navigation Bar* can be used to change the record being viewed. It generally appears when the user is in a side-tab where the information displayed is limited to one record.

For example, if the user is in the **Student** top tab > **Details** side tab, only one student is displayed. The user can:

- Use the  in the record navigation bar to search for a new student without returning to the student list.
- Use the forward and back arrows on the record navigation bar to move to the next consecutive record.

Use the first and last record buttons to move to the first record in the page selector or to the last record in the page selector.



3.5 Search Tool

The search tool is present throughout the application to provide the ability to search the values in a field set or pop-up list. The user can enter the search criteria. It is important to understand that the search will be conducted on the first column of information in the field set, **or** the column of data that represents the primary sort.

Filters can also affect the search results. For example, if the filter is set to Primary Active Students in the student list, the search will not return results for a student who is a secondary student.

Results will be returned with the closest match the system can make. The closest match record will be selected in the list.

1. Enter the value to search for in the search field.
2. Click the magnifying glass or the enter key to execute the search.



3.6 Hyperlinks

Hyperlinks are in blue lettering which show an underscore when the user hovers over them with a mouse. Clicking on a hyperlink will take the user to the details of that particular record.

Pages	School	Student	Staff	Atten												
Options	Reports	Help														
Student List																
Details	<input type="checkbox"/> 1:Adamus, Joleen															
Contacts	<table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Name</th> <th>Alerts</th> <th>Gender</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Adamus, Joleen</td> <td></td> <td>F</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Adank, Charla</td> <td></td> <td>M</td> </tr> </tbody> </table>				<input type="checkbox"/>	Name	Alerts	Gender	<input type="checkbox"/>	Adamus, Joleen		F	<input type="checkbox"/>	Adank, Charla		M
<input type="checkbox"/>	Name	Alerts	Gender													
<input type="checkbox"/>	Adamus, Joleen		F													
<input type="checkbox"/>	Adank, Charla		M													
Attendance																

3.7 Breadcrumbs

When a user has selected a record and is viewing the details, a “breadcrumb” trail will appear at the top of the list to indicate what is being viewed and the path used to arrive at that location.

In the example below, the user is viewing an attendance record for February 23, 2015 for the student Joleen Adamus in the **Attendance** top tab > **Daily History** side tab.

Breadcrumbs will create a blue hyperlink that the user can click on to return to the full list of records.

The screenshot shows a navigation menu with tabs: Pages, School, Student, Staff, Attendance, and Conduct. Under the Attendance tab, there are sub-tabs: Options, Reports, and Help. A breadcrumb trail is highlighted in a red box: **Daily Attendance History :: 2/23/2015 - Adamus, Joleen**. Below the breadcrumb is a form with a 'Save' and 'Cancel' button. The form fields are: Student > Name * (Adamus, Joleen), Date * (2/23/2015), Absent? (checked), and Late? (unchecked).

3.8 Checkboxes vs Radio Buttons

There are many selection lists throughout MyEducation BC. If a list shows round radio buttons, it indicates that only one record can be selected. If a list shows square checkboxes, then multiple records can be selected. Good examples of this are:

- **Student** top tab: More than one student can be selected at a time because there are checkboxes in front of their names.

The screenshot shows the 'Student List' interface. The navigation menu has tabs: Pages, School, Student, Staff, and Attendance. Under the Student tab, there are sub-tabs: Options, Reports, and Help. A sidebar on the left has buttons for Details, Contacts, Attendance, Conduct, and Transcript. The main table has columns: Name, Alerts, Gender, Pupil #, PEN, and YOG. The first three rows have checkboxes in the first column, indicating they can be selected.

	Name	Alerts	Gender	Pupil #	PEN	YOG
<input checked="" type="checkbox"/>	Adams, Gillian	T	F	563129	114316631	2013
<input checked="" type="checkbox"/>	Adatia, Brant		M	721508	120309539	2015
<input checked="" type="checkbox"/>	Adatia, Creston		M	1485346	102915246	2015
<input type="checkbox"/>	Adkins, Sharlein		F	1521990	119661791	2015

- **Student** top tab > **Options** menu > **Snapshots**: Only one snapshot can be selected because there are radio buttons in front of them.

Name	
<input checked="" type="radio"/>	Gr 12 No Prog of Study Union
<input type="radio"/>	Gr 12s No Prog of Study Intersect
<input type="radio"/>	Grade 12s
<input type="radio"/>	No Program of Study
<input type="radio"/>	StrongStart Students

3.9 Clearing Record Selections

When multiple records have been selected in a list, a user may clear them using one of the following options:

- Manually uncheck the box in front of a record. This will de-select an individual record.
- Use the  icon at the top of the list of selected records. This will clear ALL selections.
- Changing the filter to generate a new list.
- Leaving the top tab to navigate to another area of the application. This is only true if the user is on the main list and has not performed an Options > Show Selected on the records.
- Logging out of MyEducation BC.

4.0 Icons and Alerts

MyEducation BC will display a number of icons throughout the application to indicate additional information or alert information. Hovering over these icons will provide a tool tip that displays what type of information the icon contains. Clicking on the icon will generate additional information. These icons include:

- **Medical and health alerts:** , 
- **Legal alerts:** 
- **Other alerts:** 
- **Quick Status for locating a student:** 
- **Student Services alerts:** , 
- **Informational alerts:** 

Information on maintaining student alerts is included in the Enrollment Management and Demographics and Student Services documentation. Information alerts are established at the enterprise level.

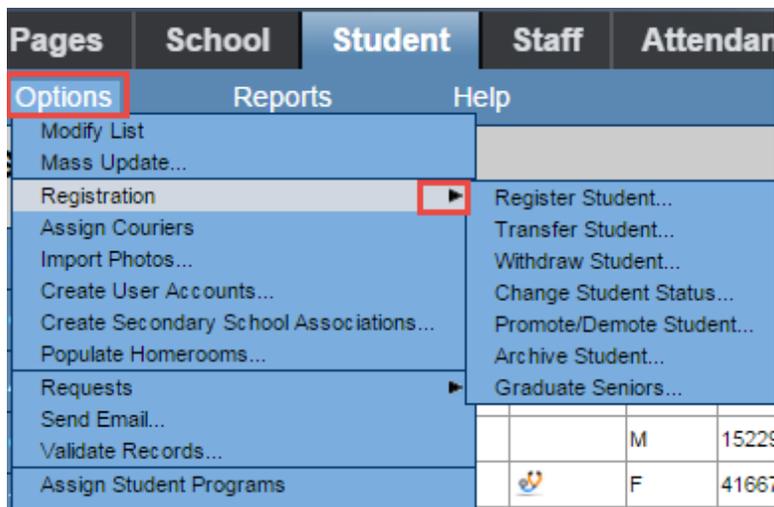
5.0 Menu Bar

The menu bar appears just below the top tabs in MyEducation BC. The menu headers are the same regardless of the top tab the user has selected, with the exception of the quick letter function on the Student top tab. The items displayed in the menu will change, depending on the top tab *and* side tab the user has selected.

The various options and tools in the menu bar are described in the following sections.

5.1 Options

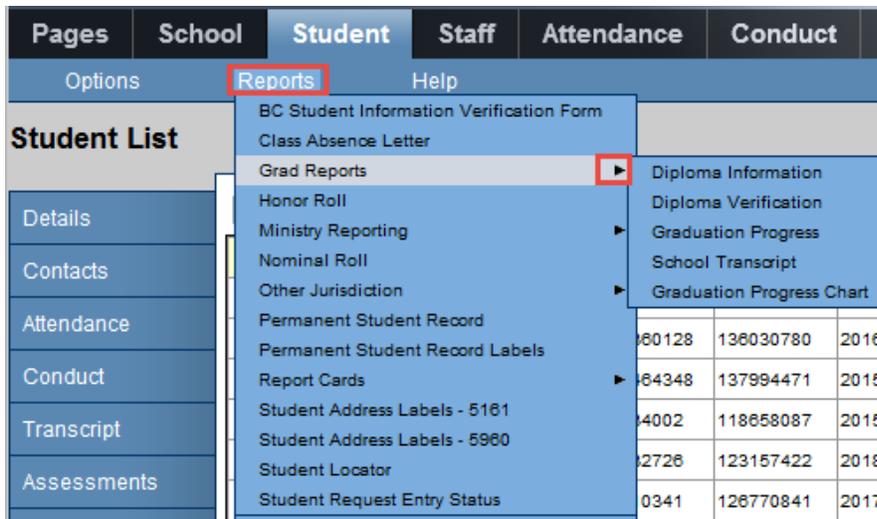
The **Options** menu is an action centre. This is where a user can initiate actions on the data that is displayed on the screen. In some cases, the list of items may show an arrow, indicating additional options.



5.2 Reports

Reports will display a list of reports available in specific areas of the application. It is important to note that reports are associated with top tabs and side tabs and relate to the data displayed on page. For example: In the **Student** top tab, clicking on **Reports** will show a list of several reports, and a few report categories, indicated by an arrow, which list additional reports. Staying in the **Student** top tab and clicking on the **Transcript** side tab will generate a shorter list of reports that are related to student transcript information.

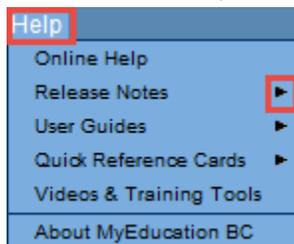
The My Job Queue item in the Reports list will present a window that shows reports the user has run and the report status. So it is not necessary to wait for a report to finish once Run has been selected. The report can be retrieved later from My Job Queue.



Pages	School	Student	Staff	Attendance	Conduct
Options		Reports	Help		
Student List	BC Student Information Verification Form				
	Class Absence Letter				
	Grad Reports		▶	Diploma Information	
	Honor Roll			Diploma Verification	
	Ministry Reporting		▶	Graduation Progress	
	Nominal Roll			School Transcript	
	Other Jurisdiction		▶	Graduation Progress Chart	
	Permanent Student Record				
Details	Permanent Student Record Labels		80128	138030780	2016
Contacts	Report Cards		84348	137994471	2015
Attendance	Student Address Labels - 5161		4002	118658087	2015
Conduct	Student Address Labels - 5960		2726	123157422	2018
Transcript	Student Locator				
Assessments	Student Request Entry Status		0341	126770841	2017

5.3 Help

Several Help options are available through Help on the menu bar as well. It is important to note that some of these tools are not customized for MyEducation BC and may reference options or functions that are not available to District and School Users due to BC standards and configuration. However, it is still useful for many basic functions.



- Help
- Online Help
- Release Notes
- User Guides
- Quick Reference Cards
- Videos & Training Tools
- About MyEducation BC

The **About MyEducation BC** item will provide information about the server to which the user's session is connected. This will display below the copyright information and can be useful information for the service desk if users are experiencing problems with performance or report running in MyEducation BC. Example: vaspnaprd3 indicates that the user is on server 3.

5.3.1 On-line help

On-line help opens in a new window and provides a variety of ways to search for information. The on-line help function will respond to the screen being viewed when On-line help is selected. For example, if the user is on the **Student** top tab, topics on student information will display. If the **Attendance** top tab is selected when launching on-line help, topics related to attendance will be displayed.

5.3.2 Release Notes

Release notes will provide information about the latest changes to the software product. Some of this information may refer to the application as a whole and is not customized for MyEducation BC. They may reference options or functions that are not available to District and School Users due to BC standards.

5.3.3 User Guides

User guides open up as documents with hyperlinks in the table of contents. These guides can be very helpful for some areas of the application as a reminder of how to perform certain functions. Remember that they are not customized for MyEducation BC and the custom guides posted on the ISW should be used wherever possible, as they represent the customized functionality of MyEducation BC.

5.3.4 Quick Reference Cards

Quick reference cards are short, task-specific reference documents. These can be very useful for end users as reminders for specific tasks without generating a large document. These are also not customized to MyEducation BC, but can still be useful.

5.3.5 Videos & Training Tools

This area of the Help menu provides categories of training tools which contain Lesson Plans, Quick Reference Guides and Videos. Clicking on a category will display all of the options within that category. The quick reference guides within these toolkits are different from the quick reference *cards*. The quick reference guides are task-specific, but are often more than 2 pages.



5.4 Menu Bar Tools

The menu bar provides several tools for filtering, displaying, sorting and exporting data in MyEducation BC. The options that display when using these tools depend on the top tab and side tabs of the application.

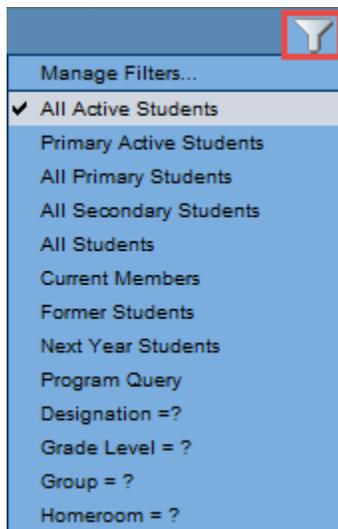
These tools are described below.



5.4.1 Filters

Filters provide the user with the ability to group records in a list. Filters are connected to queries, so they are dynamic – every time a user selects a filter, it will display all of the latest information in that group of records. Users have the ability to hide filters that are not useful to them and to change the order in which the filters display in the filter list.

Users also have the ability to create their own filters. The example below shows a filter list from the Student top tab.



System Filter	Description
All Active Students	Primary Active, Active No Primary and Secondary Students Primary = Home School Students Active No Primary Cross-Enrolled Students whose primary school is not in MyEducation BC Cross-Enrolled Students who have been withdrawn from their Primary School in MyEducation BC Secondary = Cross-Enrolled Students
Primary Active Students	Primary students with a status of Active or Active No Primary.
All Primary Students	All students for which this school is or was the last school of record. This includes active students, as well as students who are withdrawn, graduated, or inactive. It does not include students with secondary school associations to this school.
All Secondary Students	Students with a secondary school association to this school, including those who are Active No Primary.
All Students	Primary students, Active No Primary and Secondary students plus all students where this school is the last school of record.

System Filter	Description
Current Members	All students with current admission dates, including students with secondary school associations that have a current start date. This filter does not include students with a future admission date, or students with future secondary school association start dates.
Former Students	Students who were withdrawn, but have a former school association to this school. If this association record is deleted, the student will no longer appear in the filter.
Next Year Students	Students with a Next School value field populated with the name of this school.

The filters that appear in the list have been created at the system, enterprise or district level.

1. Click the  icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, users may see the following in brackets beside the name of the filters:
 - a. **System:** these filters are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
 - b. **Enterprise:** these filters have been created at the enterprise level and appear for all districts and schools. They can be hidden or moved up or down in the list, but cannot be modified.
 - c. **District:** these filters have been created at the district level for the district level views. They can be hidden or moved up or down in the list, but cannot be modified unless the user has access to the District view.
 - d. **School:** these filters have been created either by a school user, or been created by a district user in the school view. They will be visible to all users who have access to the School view. These filters can only be modified or deleted by a school user or a district user with school view access.
 - e. **User:** these filters have been created by an individual user. They will only show in the list for the user who created them and therefore can only be modified or deleted by the user who created them.

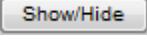
5.4.1.1 To Move a Filter

A user can choose to have the filter they use the most be the default in that screen by moving it to the top of the list.

1. Click the  icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be moved. It will be highlighted.

3. Click the  or  buttons to position the filter in the list. Any filter placed at the very top of the list will become the default filter when entering the screen.
4. Several filters can be moved at once by using Shift + click and using the  or  buttons.
5. Click **Close**.

5.4.1.2 To Hide a Filter

1. Click the  icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be hidden. It will be highlighted.
3. Click the  button. If the **Show All** box is checked, the filter will still appear here, but is now greyed out. This means the filter will no longer appear in the list when the  icon is clicked. The item can be restored at any time by clicking the  button to put it back in the list. If the **Show All** box is not checked, the filters which have been hidden will no longer be visible. This checkbox will need to be enabled in order to restore a hidden filter.
4. Click **Close**.

5.4.1.3 To Create a New Filter

Filters are connected to queries and snapshots. Users can access those queries and create them as a filter by using the **New** button in the *Manage Filters* window.

1. Click the  icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click the  button. A list of available queries will appear.
 - a. **Filter Type:** This allows a filter to be created from an existing query or snapshot. Changing this selection will change the list of options below.
 - b. **Owner:** Who will see and use this filter? If the user has district or school access, they will have the ability to set this filter for all users with those views. If the user sees no other selection, they are creating a User filter.
 - c. **Name:** Give the filter a name that makes sense for its function.
3. Click the radio button beside the query or snapshot in the list that the filter will be based on.
4. Click **OK**. The filter will now appear in the Manage Filters window and in the list below the  icon for this screen.
5. Click **Close** on the *Manage Filters* window.

5.4.1.4 To Edit a Filter

A user can only edit a filter that exists at the level of their user role view. In other words, a district user who has access to both district and school views can edit a *District* or *School* filter. A school user can edit a *School* filter because they have school view access. A user that only has staff view will only be able to edit their own *User* filters.

1. Click the  icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click the  button.
3. In the pop-up window:
 - a. **Filter Type:** This allows a filter to be changed from its current query or snapshot, to a new query or snapshot. Changing this selection will change the list of options below.
 - b. **Owner:** Who will see and use this filter? If the user has district or school access, they will have the ability to set this filter for all users with those views. If the user sees no other selection, they are creating a User filter.
 - c. **Name:** Give the filter a name that makes sense for its function.
4. Click **OK**.
5. Click **Close** on the *Manage Filters* window.

5.4.1.5 To Copy a Filter

Because a filter is connected to a query or a snapshot, there are not too many reasons to copy a filter. A user may decide to copy a filter in order to rename it to something that is more meaningful.

1. Click the  icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click the  button.
3. In the pop-up window:
 - a. **Name:** Give the filter a name that makes sense for its function.
 - b. **Owner:** Who will see and use this filter? If the user has district or school access, they will have the ability to set this filter for all users with those views. If the user sees no other selection, they are creating a User filter.
4. Click **Save**.
5. Click **Close** on the *Manage Filters* window.

If a filter has been copied, the user may want to consider hiding or deleting the original to avoid confusion.

5.4.1.6 Deleting a Filter

A user can only delete a filter that exists at the level of their user role view. In other words, a district user who has access to both district and school views can delete a *District* or *School* filter. A school user can delete a *School* filter because they have school view access. A user that only has staff view will only be able to delete their own *User* filters.

1. Click the  icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be deleted. It will be highlighted.
3. Click the  button.
4. Click **Close** on the *Manage Filters window*.

Deleting a filter does not delete the query behind it. If a filter is deleted in error, it can be restored by using the **Add** button.

5.4.2 Field Sets

Field sets simply display information in a list. By selecting a different field set, the user is choosing to display different columns of information for the same records in the list. Field sets can be very useful for creating commonly used sets of information and then extracting those into a spreadsheet for analysis or manipulation.

The field sets that appear in the list already have been created at the Enterprise level or by district users who may have created field sets for their own schools.

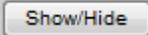
1. Click the  icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, users may see the following in brackets beside the name of the field sets:
 - a. **System:** these field sets are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
 - b. **Enterprise:** these field sets have been created at the enterprise level and appear for all districts and schools. They can be hidden or moved up or down in the list, but cannot be modified.
 - c. **District:** these field sets have been created at the district level for the district level views. They can be hidden or moved up or down in the list, but cannot be modified unless the user has access to the District view.
 - d. **School:** these field sets have been created either by a school user, or been created by a district user in the school view. They will be visible to all users who have access to the School view. These field sets can only be modified or deleted by a school user or a district user with school view access.

5.4.2.1 To Move a Field set

A user can choose to have the field set they use the most be the default in that screen by moving it to the top of the list.

1. Click the  icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be moved. It will be highlighted.
3. Click the  or  buttons to position the field set in the list. Any field set placed at the very top of the list will become the default field set when entering the screen.
4. Several field sets can be moved at once by using Shift + click and using the  or  buttons.
5. Click **Close**.

5.4.2.2 To Hide a Field Set

1. Click the  icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be hidden. It will be highlighted.
3. Click the  button. If the **Show All** box is checked, the field set will still appear here, but is now greyed out. This means the field set will no longer appear in the list when the  icon is clicked. The item can be restored at any time by clicking the  button to put it back in the list. If the **Show All** box is not checked, the field sets which have been hidden will no longer be visible. This checkbox will need to be enabled in order to restore a hidden field set.
4. Click **Close**.

5.4.2.3 To Create a New Field Set

1. Click the  icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click the  button.
3. In the pop-up window:
 - a. **Name:** Give the field set a name that makes sense for its data set.
 - b. **Owner:** Who will see and use this field set? If the user has district or school access, they will have the ability to set this field set for all users with those views. If the user sees no other selection, they are creating a User field set.
 - c. In the **Available Fields** window, use the drop-down menu to select the table from containing the desired data fields. These are listed in the order most frequently used. If the user is having trouble finding a field, use the  button to sort them into alphabetical order.
 - d. Click on the desired field to select so it is highlighted in the list.

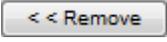
- e. Click the  button. This will move the field into the **Selected Fields** window.

Note: Multiple fields from multiple tables can be selected for the same field set.

4. Once all fields have been selected, click **Save**.
5. Click **Close** on the *Manage Field Sets* window. The field set will now appear in the list for selection.

5.4.2.4 To Edit a Field set

A user can only edit a field set that exists at the level of their user role view. In other words, a district user who has access to both district and school views can edit a *District* or *School* field set. A school user can edit a *School* field set because they have school view access. A user that only has staff view will only be able to edit their own *User* field sets.

1. Click the  icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be edited. It will be highlighted.
3. Click the  button.
4. In the pop-up window:
 - a. **Name:** Enter the new name for the field set, if appropriate.
 - b. **Owner:** Who will see and use this field set? If the user has district or school access, they will have the ability to set this field set for all users with those views. If the user sees no other selection, they are creating a User field set.
5. In the *Available Fields* window, click the fields of information to add to the field set. Click the  button. Alternatively, in the *Selected Fields* window, click the fields of information to be removed from the field set. Click the  button.
6. Click **Save**.
7. Click **Close** on the *Manage Field sets* window.

5.4.2.5 To Copy a Field set

A user may see a field set in the list that suits their needs, but wants to add or remove some information from it. If the user does not own the field set, a copy can be made and adjusted to suit the need.

1. Click the  icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be copied. It will be highlighted.
3. Click the  button.
4. In the pop-up window:
 - a. **Name:** Give the field set a name that makes sense for its data set.
 - b. **Owner:** Who will see and use this field set? If the user has district or school access, they will have the ability to set this field set for all users with those views. If the user sees no other selection, they are creating a User field set.
5. Click **Save**.

6. Click **Close** on the *Manage Field sets* window.

If a field set has been copied, the user may want to consider hiding or deleting the original to avoid confusion or duplication in the field set list.

5.4.2.6 Deleting a Field Set

A user can only delete a field set that exists at the level of their user role view. In other words, a district user who has access to both district and school views can delete a *District* or *School* field set. A school user can delete a *School* field set because they have school view access. A user that only has staff view will only be able to delete their own *User* field sets.

1. Click the  icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be deleted. It will be highlighted.
3. Click the  button.
4. Click **Close** on the *Manage Field Sets* window.

5.4.3 Sorts

There are different ways to sort data in a field set, which are defined below. The options for sorting data in a field set are:

- Click the header of a column of data. The field set sorts by the data in that column, opposite to its original sort order. Clicking the header again sorts the data back to its order. This function can be used for multi-level sorts of up to 3 columns of data at a time. For example: clicking the *Gender* column in the **Student** top tab, then clicking the *Pupil #* column, then the *Grade* column, the grade would be the primary sort. Data displayed will be in order by *Grade*, then by *Pupil #*, then by *Gender*.
- Use the  icon, which simply sorts the data in the field set by the list value chosen for the sort. The sort icon can also be used to set any sort back to the default.

The field sets that appear in the list already have been created at the Enterprise level or by district users who may have created field sets for their own schools.

1. Click the  icon and select **Manage Sort Orders. . .**
2. In the *Manage Sort Orders* pop-up window, the following will appear in brackets beside the name of the field sets:
 - a. **System:** these sort orders are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
 - b. **Enterprise:** these sort orders have been created at the enterprise level and appear for all districts and schools. They can be hidden or moved up or down in the list, but cannot be modified.
 - c. **District:** these sort orders have been created at the district level for the district level views. They can be hidden or moved up or down in the list, but cannot be modified unless the user has access to the District view.

- d. **School:** these sort orders have been created either by a school user, or been created by a district user in the school view. They will be visible to all users who have access to the School view. These sort orders can only be modified or deleted by a school user or a district user with school view access.

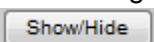
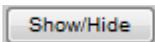
5.4.3.1 Move a sort order

A user can choose to have the sort order they use the most be the default in that screen by moving it to the top of the list. Users can also create custom sorts.

A user can choose to have the field set they use the most be the default in that screen by moving it to the top of the list.

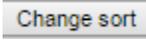
1. Click the  icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be moved. It will be highlighted.
3. Click the  or  buttons to position the field set in the list. Any sort order placed at the very top of the list will become the default sort order when entering the screen.
4. Several sort orders can be moved at once by using Shift + click and using the  or  buttons.
5. Click **Close**.

5.4.3.2 To Hide a Sort Order

1. Click the  icon and select **Manage Sort orders . . .**
2. In the *Manage Sort orders* pop-up window, click on the name of the sort order to be hidden. It will be highlighted.
3. Click the  button. If the **Show All** box is checked, the sort order will still appear here, but is now greyed out. This means the sort order will no longer appear in the list when the  icon is clicked. The item can be restored at any time by clicking the  button to put it back in the list. If the **Show All** box is not checked, the sort orders which have been hidden will no longer be visible. This checkbox will need to be enabled in order to restore a hidden sort order.
4. Click **Close**.

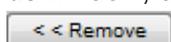
5.4.3.3 To Create a New Sort Order

1. Click the  icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click the  button.
3. In the pop-up window:
 - a. **Name:** Give the sort a name that makes sense for its function.

- b. **Owner:** Who will see and use this sort? If the user has district or school access, they will have the ability to set this sort for all users with those views. If the user sees no other selection, they are creating a User sort.
 - c. In the **Available Fields** window, use the drop-down menu to select the table to sort fields from. These are listed in the order most frequently used. If the user is having trouble finding a field, use the  button to sort them into alphabetical order.
 - d. Click on the field to select it. It will be highlighted in the list. Click the  button. This will move the field into the **Selected Fields** window.
Note: Multiple fields from multiple tables can be selected or the same field set.
4. Once all fields have been selected, click **Save**.
 5. Use the  and  buttons to arrange the fields in the desired sort order. The  button will cause (desc) to appear beside the field highlighted when clicked. This means the data in that field will be sorted in reverse order when this new sort is applied to a field set.
 6. Click **Close** on the *Manage Sort Orders* window. The sort order will now appear in the list for selection.

5.4.3.4 To Edit a Sort Order

A user can only edit a sort order that exists at the level of their user role view. In other words, a district user who has access to both district and school views can edit a *District* or *School* sort order. A school user can edit a *School* sort order because they have school view access. A user that only has staff view will only be able to edit their own *User* sort orders.

1. Click the  icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be edited. It will be highlighted.
3. Click the  button.
4. In the pop-up window:
 - a. **Name:** Enter the new name for the sort order, if appropriate.
 - b. **Owner:** Who will see and use this sort order? If the user has district or school access, they will have the ability to set this sort order for all users with those views. If the user sees no other selection, they are creating a User sort order.
5. In the *Available Fields* window, click the fields of information to be added to the sort order. Click the  button. Alternatively, in the *Selected Fields* window, click the fields of information to be removed from the sort order. Click the  button.
6. Click **Save**.
7. Click **Close** on the *Manage Sort Orders* window.

5.4.3.5 To Copy a Sort Order

A user may see a sort order in the list that suits their needs, but wants to add or remove some information from it. If the user does not own the sort order, a copy can be made and adjusted to suit the need.

1. Click the  icon and select **Manage Sort orders . . .**
2. In the *Manage Sort orders* pop-up window, click on the name of the sort order to be copied. It will be highlighted.
3. Click the  button.
4. In the pop-up window:
 - a. **Name:** Give the sort order a name that makes sense for its data set.
 - b. **Owner:** Who will see and use this sort order? If the user has district or school access, they will have the ability to set this sort order for all users with those views. If the user sees no other selection, they are creating a User sort order.
5. Click **Save**.
6. Click **Close** on the *Manage Sort Orders* window.

If a sort order has been copied, the user may want to consider hiding or deleting the original to avoid confusion.

5.4.3.6 Deleting a Sort order

A user can only delete a sort order that exists at the level of their user role view. In other words, a district user who has access to both district and school views can delete a *District* or *School* sort order. A school user can delete a *School* sort order because they have school view access. A user that only has staff view will only be able to delete their own *User* sort orders.

1. Click the  icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be deleted. It will be highlighted.
3. Click the  button.
4. Click **Close** on the *Manage Sort Orders* window.

5.4.4 Quick Charts

Charts provide an organized way to visually represent data. The Quick Chart feature enables the user to create bar, line, and pie charts from any standard list page. These charts can be saved for future use. Users with privileges to manage school and/or district resources can create charts to share school- and district-wide.

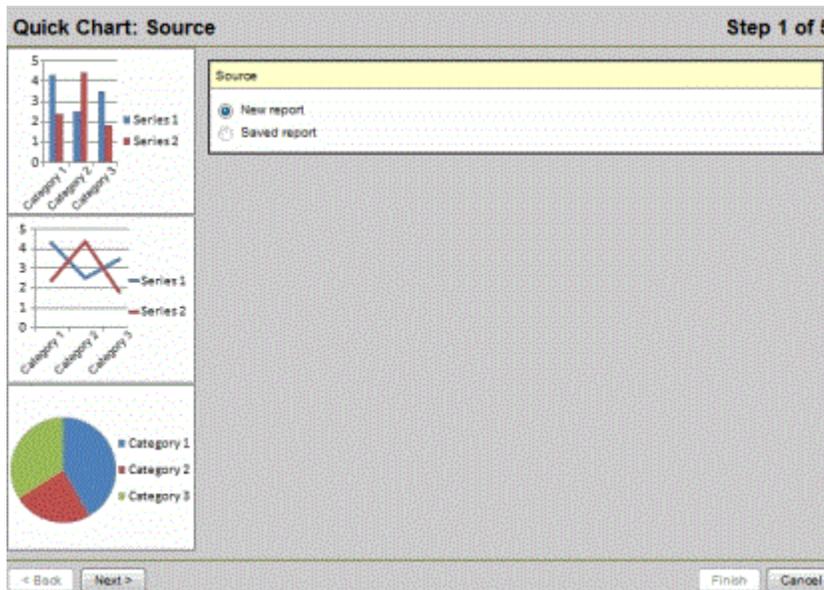
Click the  icon to access the following options:

- **Create Quick Chart:** Brings up the Quick Chart Wizard, which allows the user to customize many different areas of the resulting chart.
- **Bar Chart:** Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the bar chart.

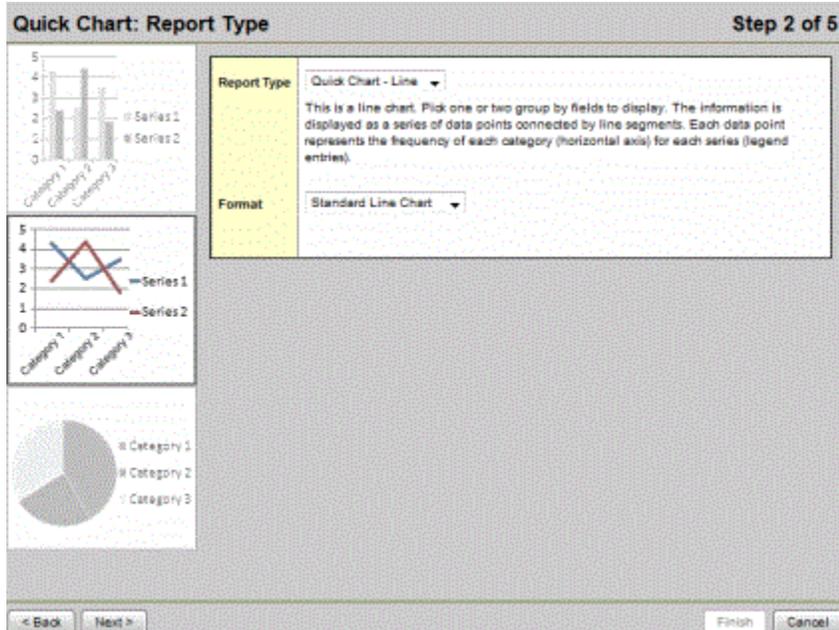
- **Line Chart:** Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the line chart.
- **Pie Chart:** Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the pie chart.

5.4.4.1 To Create a Quick Chart:

1. Click the  icon and select **Create Quick Chart** to open the *Quick Chart* wizard, or select *Quick Chart* from the **Reports** menu. The *Create Quick Chart* wizard appears:

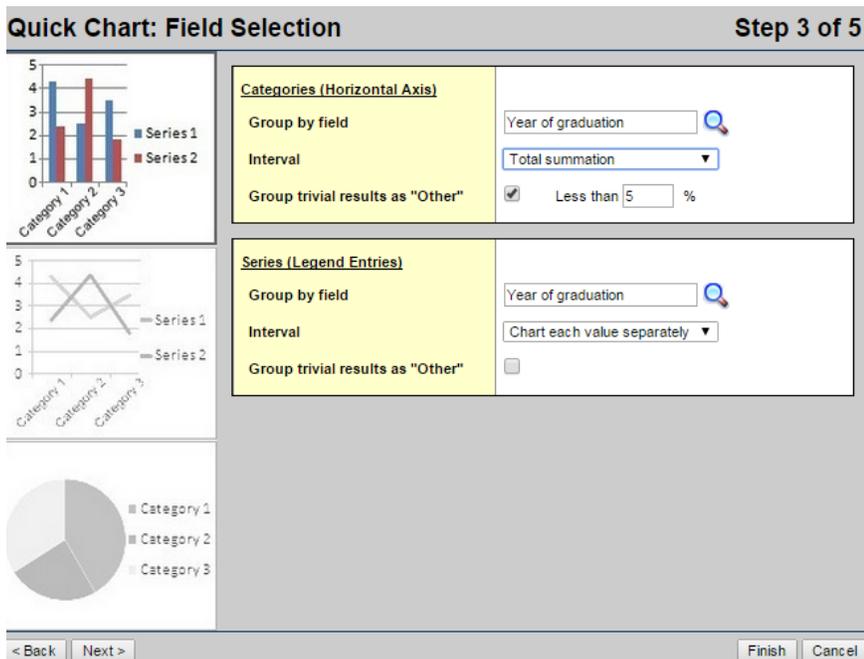


2. *Step 1: Source.*
 - a. Select **New report**.
 - b. Click **Next**.
3. *Step 2: Report Type*
 - a. Click the **Report Type** drop-down to select one of the following:
 - i. **Quick Chart—Bar**
 - ii. **Quick Chart—Line**
 - iii. **Quick Chart—Pie**
4. Click the **Format** drop-down to select the format for the chart. Select one of the following:
 - a. **Standard**
 - b. **Enhanced**



5. Step 3: Field Selection.

- a. In the **Categories (Horizontal Axis)** box, click the  icon at **Group by field** and make a selection. The user can choose from the tables and fields that are related to the records in the current list. The **Categories (Horizontal Axis)** box, sometimes called the independent variable, sets the data to measure. If the choice is a Numeric, Date or Time field, additional options appear to further organize the data which will be displayed on the chart.



- b. For bar and line charts, a **Series (Legend Entries)** box is available. Click the  icon at the **Group by field** and make a selection. Series groups appear in a legend to the right of the chart and provide a color-coded guide to data shown in the chart.

Note: Bar and line charts do not require both a category and series to be selected. Charts that exclude a category will not have x-axis labels. Charts that exclude a series will not include a legend.

6. The Interval drop-down menu for numeric has the following options:
 - a. **Chart each value separately:** Each numeric value gets its own data point.
 - b. **Interval group:** The **Interval** field groups the results according to the number entered in the **Interval group size** field. For example, if to display the group Year of Graduation in the chart in pairs, a 2 would be entered in this field. The **Interval group size** appears. The value in this field sets the number of data points that get combined into a single category.
 - c. **Interval group summations.** The **Interval group size** appears. The value in this field sets the number of data points that get combined into a single category.
 - d. **Total summation:** Sums the values of the Group by field.
7. If the list of data being charted contains trivial cases which should be excluded from the chart, the option **Group trivial results as "Other"** is provided. Select this checkbox if the users wants to group all data points of less than a certain percent together into a single point called Other. For example, if the user is only concerned with viewing the most common conduct codes, select this option and enter a value of 5% in the Less than % field. This will group all codes which total less than 5% of the total data into a single Other group.

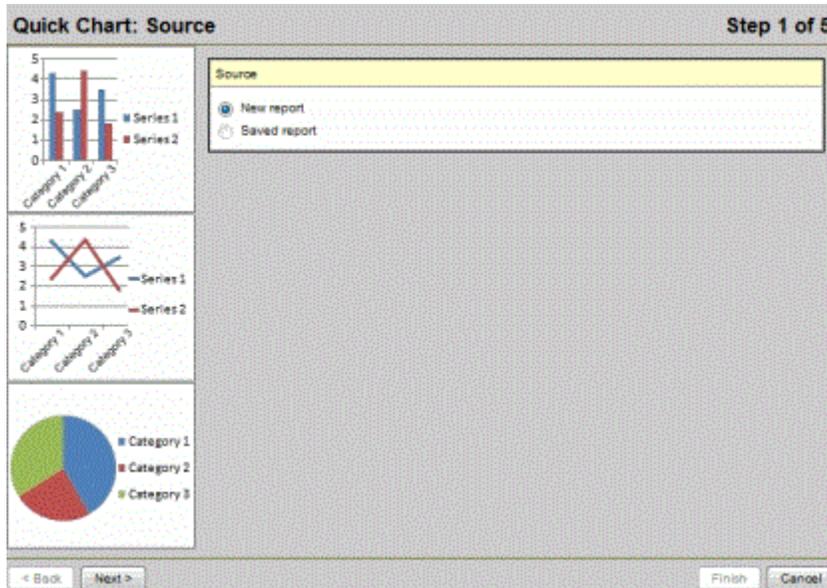
Note: This option can only be used in the Categories **or** Series, not both.

8. Click **Next** to continue the wizard and set chart options.
9. Click **Finish** to create the chart.

Note: The **Finish** button can be clicked at any point in the wizard. New charts use the default format options if **Finish** is clicked at any point before the final step in the wizard.

5.4.4.2 To Use a Saved Quick Chart

1. Click the  icon and select **Create Quick Chart** to open the *Quick Chart* wizard, or select *Quick Chart* from the **Reports** menu. The *Create Quick Chart* wizard appears:



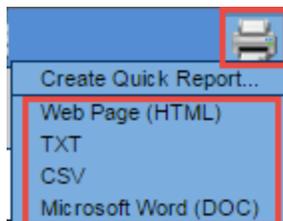
2. *Step 1: Source.* Click **Saved report**. A table of saved Quick Charts appears in the dialog box. Select the Quick Chart to be viewed or edited.
3. Click **Next** to continue editing, or click **Finish** to show the chart.

5.4.5 Quick Print

Users can generate a **Quick Print** using the  icon in the menu bar on any list page.

5.4.5.1 To generate a Quick Print using the Quick Print icon:

1. Go to the list page containing the type of data to be reported on.
2. Select the records to be included on the report.
3. If records have been manually selected in a large list, be sure to go to the **Options** menu and click **Show Selected**. Users can also use a filter or query to isolate the records to report on. Quick Prints include any records that appear on the current list.
4. Click the Quick Print icon  in the menu bar.



5. Select one of the format options.
 - a. **Web Page (HTML)**: to view the information in an HTML file.
 - b. **CSV**: to view the information in a text file that separates each field with a comma. If saved, the file will have a .CSV extension
 - c. **TXT**: to view the information in a text file that separates each field with a comma. If saved, the file will have a .TXT extension.

Note: The two comma-separated values formats (CSV and TXT) create identical files; the only difference is the file extension. Some Web browsers only handle one extension properly.

- d. **Microsoft Word (DOC):** to view the information in a Word document.
6. Different browsers handle quick prints in different ways. Users may need to change browser settings to allow downloads, or use shortcut keys such as Ctrl + S to save the data prior to opening it.

5.4.6 Maximize & Minimize

Users can click on these icons to hide top tabs to allow more records per page to be visible or to return top tabs to their view.

6.0 Snapshots

A snapshot is different from a filter. Where a filter is dynamic and always returns the latest data, snapshot is a static list. It always displays the same records unless it is manually edited. Only the user who created the snapshot can add students to, or remove students from it.

6.1 Creating and Deleting Snapshots

6.1.1 Creating a Snapshot

1. In the **School** view, click the **Student** top tab. Select the records to be included in the snapshot.
2. If records have been manually selected in a large list, be sure to go to the **Options** menu and click **Show Selected**. Users can also use a filter or query to isolate the records for a snapshot. Snapshots will include any records that appear on the current list.
3. In the **Options** menu, select **Snapshots**.
4. In the pop-up window, click the **New** button.
 - a. **Name:** Give the snapshot a name that represents the data in the snapshot.
 - b. **Owner:** Who will see and use this snapshot? If the user has district or school access, they will have the ability to set this for all users with those views. If the user sees no other selection, they are creating a user snapshot.
 - c. **Save as filter:** If this is selected, the snapshot will appear in the filter menu under the  icon.
 - d. **Move to the top of my list:** If this is selected the snapshot will appear as the first item in the filter menu and will become the default filter for that screen.
5. In the **Records to Include** box, select one of the following:
 - a. **Current List:** includes records selected on the list page.

- b. **Snapshot Combination:** this will combine two existing snapshots and is only available if two or more snapshots have already been defined. This provides 3 options:
- i. **Union:** Any records that appear in the first snapshot selected **or** the second snapshot select. For example, for a snapshot of students who are in grade 12 that have a program of study, select **Union**.
 - ii. **Intersection:** Only records that appear in both the first **and** second snapshots selected. For example, for a snapshot of students who are both in grade 12 and have a program of study, select **Intersection**.
 - iii. **Difference:** Any record that appears in the first snapshot selected, but not in the second. For example, for a snapshot of students who are in grade 12 but do not have a program of study, select **Difference**.
6. Click **Save**.

6.1.2 Removing a Snapshot from the Filter Menu

If a snapshot was saved as a filter in error, or is no longer needed as a filter, it can be removed from the filter menu.

1. Click on the  icon and select **Manage Filters**.
2. In the *Manage Filters* window, click on the snapshot so it is highlighted.
3. Click the **Delete** button.
4. Click **Close**.

Note: Deleting the filter does not delete the snapshot behind it. The filter can be restored by creating a new filter and selecting the snapshot.

6.1.3 Deleting a Snapshot

If a snapshot has become obsolete, it can be deleted from the snapshot menu.

1. In the **Options** menu, select **Snapshots**.
2. Select the snapshot to be deleted.
3. Click **Delete**. Note that it warns the user that any filter associated with the snapshot will be deleted.
4. Click **OK**.

6.2 Add a Snapshot to a Student

Snapshots are static lists and will not update automatically when a new student meets the criteria the snapshot was based on.

6.2.1 To add a snapshot to a student:

1. In the **Student** top tab, select the student to be included in the snapshot.
2. Click the **Snapshots** side tab.
3. In the **Options** menu, select **Add**.
4. Select the snapshot from the list.
5. Click **OK**.

6.3 Removing a Snapshot from a Student

If a student no longer meets the criteria for the snapshot, a user may want to delete them from that snapshot.

6.3.1 To remove a snapshot from a student.

1. In the **Options** menu, select **Snapshots**.
2. Select the snapshot to be modified. Click **Use**. The list of students in the snapshot will appear.
3. Check the box beside the student to be removed from the snapshot.
4. Click the **Snapshots** side tab.
5. In the **Options** menu, select **Delete**.
6. Click **OK**.

7.0 Queries

A query is *dynamic*. A query performs a new search and displays current information each time it is run. For example, the list of students assigned to a homeroom may be different today than it was yesterday because a new student enrolled and was assigned to the homeroom.

7.1 Creating a Simple Query

1. In the **Options** menu, select **Query**.
2. In the *New Query* window, use the following table to select appropriate fields:

Fields	Descriptions
Tables	Select the table to search information in. The selected table determines the selections in the Fields area. For example, if the Student table is selected, fields in the student details appear.
Fields	At Fields, select the field to be included in the search criteria. Note: Fields within each reference table are listed from most commonly used to least commonly used. To change this order to alphabetical, click the Alpha Sort button 
Operator	Select an appropriate operator. For example, if the search is for students with a specific year of graduation, select Year of graduation in the Fields box, and select the Equals operator.
Value	Enter the search value. In some cases, this may be a pick list or drop down menu.

3. Click **Add** to add the criteria to the *Search criteria* box. To add other criteria, select the **Table**, **Field**, and **Operator**, and enter the **Value**, if appropriate.
4. Click **And** or **Or** to determine if the students should meet the first criteria, the second criteria, or both to be included in the search.
5. Confirm the correct search criteria are displayed in the *Search criteria* box. To delete the criteria from this search, highlight it in the *Search criteria* box and click **Delete**.

- In the **Search based on** field, use the drop-down to select which students should be included in the search.

- Click the **Search** button to execute the search.

Once a query has been executed, the records matching the search criteria will be displayed on the screen. The upper right corner of the screen, above the list, will indicate that the records displayed are a custom selection. Use the  icon to return the list to all records or another selection.

7.2 Saving a Query

If a query will be used frequently, it can be saved for future use.

- Create query using instructions for Creating a Simple Query until all the search criteria are selected.
- Click **Save as. . .** The Save as dialogue box appears.
 - Name:** give the query a name that will make sense. If it will be saved as a filter, keep the name a reasonable length.
 - Owner type:** Click the drop-down to select one of the following:
 - User:** to give an individual user access to the query.
 - School:** to give users at a school access to the query. User must have access to the school view to use this option.

- **District:** to give all users in a district access to the query. User must have access to the district view to use this option.
 - c. **Owner Name:** click the magnifying glass to change the owner of the query. The owner can edit a saved query.
 - d. **Save as filter:** Select this checkbox to have this query automatically appear on the  menu for all users who have access to it. If this checkbox is selected, the next three fields are accessible.
 - e. **Filter Owner type:** Click the drop-down to select the owner type as appropriate. These options are defined the same as the **Query Owner Type** options.
 - f. **Filter Owner name:** click the magnifying glass to change the owner of the query. The owner can edit a saved filter.
 - g. **Move to the top of my list:** Checking this box will place the query at the top of the  menu. If a query is first on the filter menu, it becomes the default filter for that screen.
3. Click **Save**.

7.3 Editing a Query

Users must have the appropriate permissions to edit the query.

1. In the **Options** menu, select **Query**.
2. In the *New Query* pop-up window, click the **Select** button. A list will pop up with all the queries.
3. Click the radio button beside the query to be edited.
4. Click **Edit**.
5. Adjust the **Name** and **Owner** fields, if necessary.
6. Click **Save**.
7. Ensure the query is still selected and click **Use**.
8. Adjust search criteria as necessary.
9. Click **Save**.

7.4 Copying a Query

Users can copy a query if it contains most of the elements they want, but adjustments are necessary.

1. In the **Options** menu, select **Query**.
2. In the *New Query* pop-up window, click the **Select** button. A list will pop up with all the queries.
3. Click the radio button beside the query to be copied.
4. Click **Copy**.
5. Give the new query a **Name** and **Owner** type.
6. Click **Save**.

7. Ensure the query is still selected and click **Use**.
8. Adjust search criteria as necessary.
9. Click **Save**.

7.5 Delete a Query

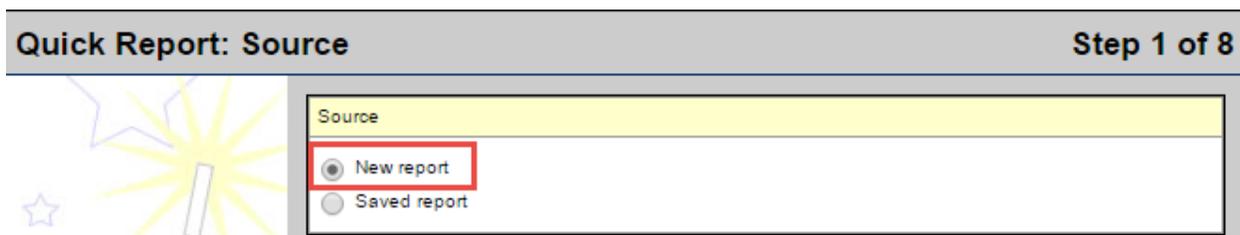
If a query has become obsolete, it can be deleted

1. In the **Options** menu, select **Query**.
2. In the *New Query* pop-up window, click the **Select** button. A list of queries will pop up.
3. Click the radio button beside the query to be deleted.
4. Click **Delete**.
5. Click **Cancel** to close the query list popup.
6. Click **Cancel** to close the *New Query* window.

8.0 Creating a Simple Quick Report

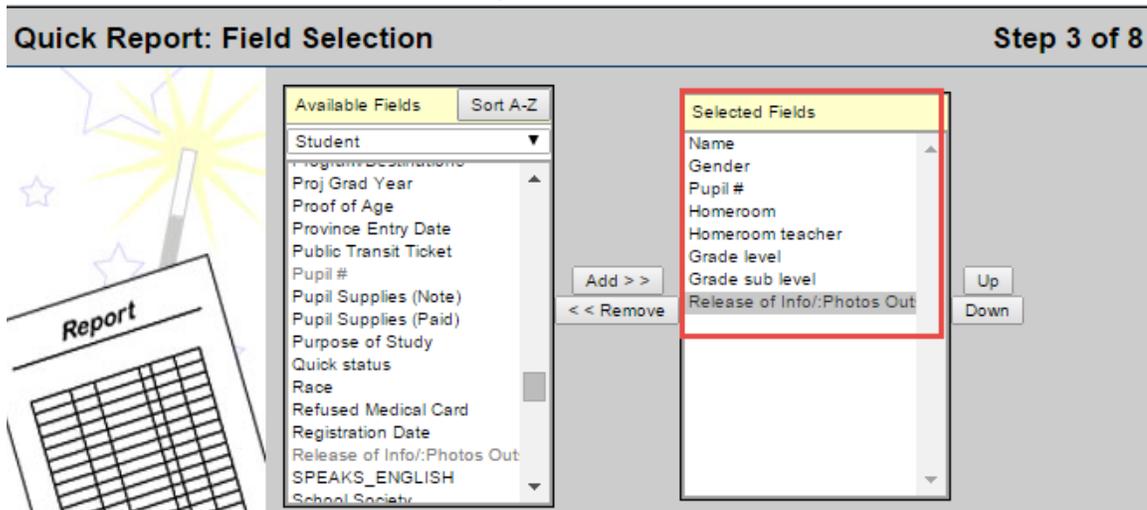
Quick Reports provide an opportunity for a user to create a customized report that contains specific data elements. For the example below, this is done from the Student top tab, but quick reports can be created in different areas of the application with elements that are relevant to the chosen area of the application.

1. In the **School** view, click the **Student** top tab
2. Click the **Reports** menu item and select **Quick Report**
3. In Step 1 of the Wizard, select **New Report**. Click **Next**.

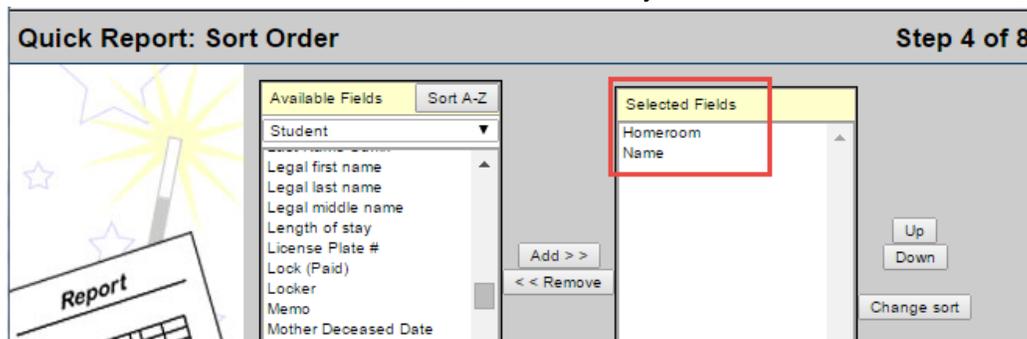


4. In Step 2 of the wizard, select **Simple**. Click **Next**.
5. In Step 3 of the wizard, click the **Sort A-Z** button to sort the fields in the *Student* table in alphabetical order. The *Selected Fields* box will automatically contain the data fields from the field set displayed on the screen when entering the quick report function.
6. Select the desired fields and click the **Add >>** button to move it to the *Selected Fields* box. The drop-down menu can be changed from the Student table to a different table to combine data elements from other areas of the application.

- In the *Selected Fields* box, click on any fields not needed and click the **Remove** button.



- Click **Next**.
- In step 4 of the wizard, select the field(s) to sort by in the *Available Fields* list and use the **Add** button to move them to the *Selected Fields* box. The primary sort will be the first field in the *Selected Fields* box, the secondary sort will be the second field, etc.



- Click **Next**.
- Step 5 of the wizard is optional. Use these functions to create counts, if desired.
- Click **Next**.

13. In Step 6 of the wizard:
 - a. **Report Title:** Enter a title that makes sense for this report.
 - b. **Print date:** If selected, the date the report was generated will appear on the report.
 - c. **Body > Format:** Select the format for the report.
 - d. **Body > Font Face:** Select the font for the report.
 - e. **Body > Font Size:** Select the font size for the report.
 - f. **Body > Grid lines:** Select whether the report should have grid lines for horizontal, vertical, or both, or none.
 - g. **Shade alternate lines:** If selected, the data will appear with grey shading on alternate lines.

Quick Report: Format Options **Step 6 of 8**

Header	
Report title	Release of Info Report
Print date	<input checked="" type="checkbox"/>
Body	
Format	Web Page (HTML) ▼
Font face	Arial ▼
Font size	Medium ▼
Grid lines	Horizontal & Vertical ▼
Shade alternate lines	<input type="checkbox"/>

14. Click **Next**.
15. Step 7 of the wizard is optional. It allows the user to rename the fields that will appear on the report. To adjust the name of a field, select it from the **Field** drop-down. In the **Title** field, give it a name that makes sense. Note that the field is only being re-named for the report – not for the application.
16. Click **Next**.
17. In Step 8 of the wizard, the report may be saved for future use. To save this quick report, click the **Save As** radio button.
18. In the activated **Name** field, type a name for the saved report. A school user will likely be able to set the Owner type to School so the report is available to other users in the school.

Quick Report: Save Options Step 8 of 8



Save Options	
<input type="radio"/> Don't save	
<input type="radio"/> Save	
<input checked="" type="radio"/> Save as	

Name	Release of Info Report
Owner	
Type	School ▼
Name	Queen Charlotte Secondary 🔍

19. Click **Finish**.